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EXECUTIVE COMMITTEE
ACCOMPLISHMENTS REPORT
March – May 2024

This quarterly report highlights the Department of Employee Trust Funds’ (ETF’s) highest-value strategic and operational accomplishments — including daily business activities, process improvements, successes, and milestones — achieved from March–May 2024. All accomplishments relate to the four goals in our current strategic plan.

EFFORTLESS CUSTOMER EXPERIENCE (increasing employer competency for managing benefits; increasing member personalization for managing their benefits)

Employer

- Developed and implemented training and job aids to support employers with a new file transfer method using Share Point Online to submit and edit employee and enrollment data for the Insurance Administration System Program (IAS). The new method offers greater efficiency in file transfers and increased security, as Multi-Factor Authentication is a new component.

Member

- Mailed the *WRS 2024 Statement of Benefits* to the home addresses of active and inactive employees, and alternate payees. University of Wisconsin System employees can access their statements through the University of Wisconsin’s secure employee portal. The ETF website provides convenient resources to help members understand statements.
- Conducted the *Your Steppingstones to Retirement* webinar, which provides information on Social Security, Wisconsin Retirement System (WRS) pension, and supplemental retirement savings through the Wisconsin Deferred Compensation Program (WDC). There were 616 attendees, and the post-event survey received a satisfaction rating of 4.63 out of 5.
- Distributed the annual satisfaction survey to participants of the WDC.

PERFORMANCE MEASUREMENT AND PROCESS MANAGEMENT (expanding metric-based decision-making to optimize key capabilities; expanding business process management to improve operations and support innovation.)

- Improvements to both ETF and vendor processes, and additional member education, has resulted in a 28% decrease in Flexible Spending Account claim business debt collection for 2023 as compared to the previous year.

Pamela L Henning

Reviewed and approved by Pam Henning, Assistant Deputy Secretary
 Electronically Signed 06/05/2024

Board	Mtg Date	Item #
EXC	06.19.24	4A

- Completed a process improvement to streamline the list of inactive members who have not taken a benefit, that by law, must be contacted the year they reach age 69 ½. This list of inactive members averaged 800 names in previous years and was streamlined to just 75 names during this reporting period. This significant improvement is the result of starting to look for these lost contacts much earlier than age 69 ½, when the chances of locating them are greater.
- Created documentation for the annual Statement of Benefits testing efforts, to make processes more easily repeatable, be operationally efficient and guard against loss of institutional knowledge.

TALENTED AND AGILE WORKFORCE (attracting, integrating, and advancing top talent; advancing employee development through meaningful performance management approaches; implementing recruitment and retention practices to support equity and inclusion.)

- Conducted the eighth and ninth ETF Staff Networking Group meetings, which are centered on diversity, equity, and inclusion. Each meeting was attended by more than 50 ETF staff.
- Collaborated with the Wisconsin Department of Transportation to organize the second annual Statewide Diversity Celebration, scheduled for August 2024.

MODERN, SECURE AND RESILIENT INFORMATION TECHNOLOGIES (developing and deploying customer-focused solutions; integrating systems and processes for seamless, timely and secure stakeholder experiences). This includes ECM, IAS, data management, and information security.

IAS

- Reset the timeline and staffing structure of the IAS Program to allow for better customer experience, decreased risk, the development of a solution that addresses the complexity of ETF's benefit programs, and to increase the likelihood of user adoption by our members. This included the addition of four project managers and four business analysts to the program team, and increased business and program oversight.
- Initiated development of an Insurance Data Source System, which will gather source system data for provision to My Insurance Benefits (BenefitsPlace) and feed insurance data into the new ETF Data Lake.
- Completed milestones in the IAS Training Plan, including:
 - Developing an intake process to capture training needs across the IAS Program;
 - Defining learning objectives for live courses; and
 - Establishing a training workgroup with DOA, UW, and UWHC stakeholders to align the training plan with their team members' roles and responsibilities.

- Developed a Reporting Request Intake process for new IAS Go-Live report requests.
- Established a reporting solution to provide vendors visibility into data to review discrepancies with their system and the monthly 834 files delivered by My Insurance Benefits (BenefitsPlace).
- Engaged project and program sponsors with an IAS Sponsor Briefing to onboard the new team members and ensure consistency with roles and responsibilities related to IAS strategy at the project level.
- Finalized content management work for the Department of Administration, University of Wisconsin, UW Hospital and Clinics, and local employers' configurations, which will enhance the user experience through customizable "help text" opportunities within My Insurance Benefits (BenefitsPlace).
- Completed a battery of testing efforts related to vendor file exchanges including multiple employee change scenarios and data and sync testing.
- Successfully processed data conversion files from 429 Local Employers for IAS project conversion and testing efforts.
- Completed a milestone for IAS daily transaction testing with a 100% scenario success rate. This milestone involved processing eligibility and demographic data from employers and sending it to Benefitfocus.

Security and Risk Management

- Completed a review and audit of all privileged and employer access accounts, ensuring appropriate and secure access to ETF IT systems by ETF staff and business partners.
- Enabled RSA Security, a form of public-key cryptography that is used to encrypt and decrypt data, for visually impaired staff to securely access ETF systems using a more accessible login approach.
- Decommissioned legacy infrastructure to align with modernization efforts.
- Initiated various security improvements to service delivery architecture that protects ETF staff and data, including:
 - Migration to a new Security Information and Event Management (SIEM) solution to help detect threats before they disrupt operations and assist in investigations.
 - Implementation of a Security Orchestration, Automation and Response (SOAR) solution to automate portions of the investigation of security events, allowing staff to respond quicker and with a clearer picture of what is occurring.
- Performed security risk assessments for 17 vendors.

- Performed initial review of Policy, Standards, Processes, and Controls findings from DET based on a Legislative Audit Bureau audit.
- Completed initial HIPAA Security Risk Assessment identifying key risk areas and potential mitigations to address them.
- Successfully migrated 11 applications to the modernized Web Application Hosting Platform, including minor updates to the applications for security purposes.

OTHER NOTEWORTHY ACCOMPLISHMENTS: this includes Insurance Program, Administration, Compliance, and Policies.

- Working with ETF's consulting actuary, prepared the 2023 valuation of retired lives, which determines the annuity adjustments for the Core and Variable Retirement Funds.
- Closed calendar year 2023, which included reconciling employer accounts, calculating the WRS effective interest rate, and applying interest to members accounts.

Insurance Program

- ETF received rate information from Health Plans, participated with Segal in doing a comprehensive analysis, hosted individual meetings with Health Plans, and processed Best and Final Offers from Health Plans. All this work was completed in order to negotiate and craft rate and reserve recommendations for the GIB consideration in May and to enter into program agreements with individual Health Plans.
- Launched the It's Your Choice 2025 Project with cross-functional areas in April. This project touches 16 different areas of ETF and involves over 70 resources. All activities and deliverables must be completed by late September in preparation for hosting Open Enrollment.
- Request for Proposals (RFP) were written, approved, and published for the Medicare Advantage/Plus, Pharmacy Benefit Manager (PBM), and Pre-Tax Programs. These are the three active procurements underway for the next two years. Proposal submissions from vendors are due either July 11 or August 1 depending on the RFP.
- Met with a legislator to discuss the importance of addressing mental health care. The goal is to persuade others to see the importance in improving access to mental health professionals for all employees directly connected with the employee assistance program.
- Updated and delivered the Account Manager's Manual to all health plans. This manual was created in 2019 to explain the job responsibilities for the health plan account managers pertaining to ETF. Account managers refer to it for guidance,

direction, and instructions pertaining to deliverables as well as how to perform their daily tasks related to ETF.